

Org chart

Requirements

This user guide is for anyone on Claromentis 8.2+

Introduction

The Org chart provides access to the Organisation Chart application where you can view a list of all your department structures. This article will go over the link to the org chart in the People application.

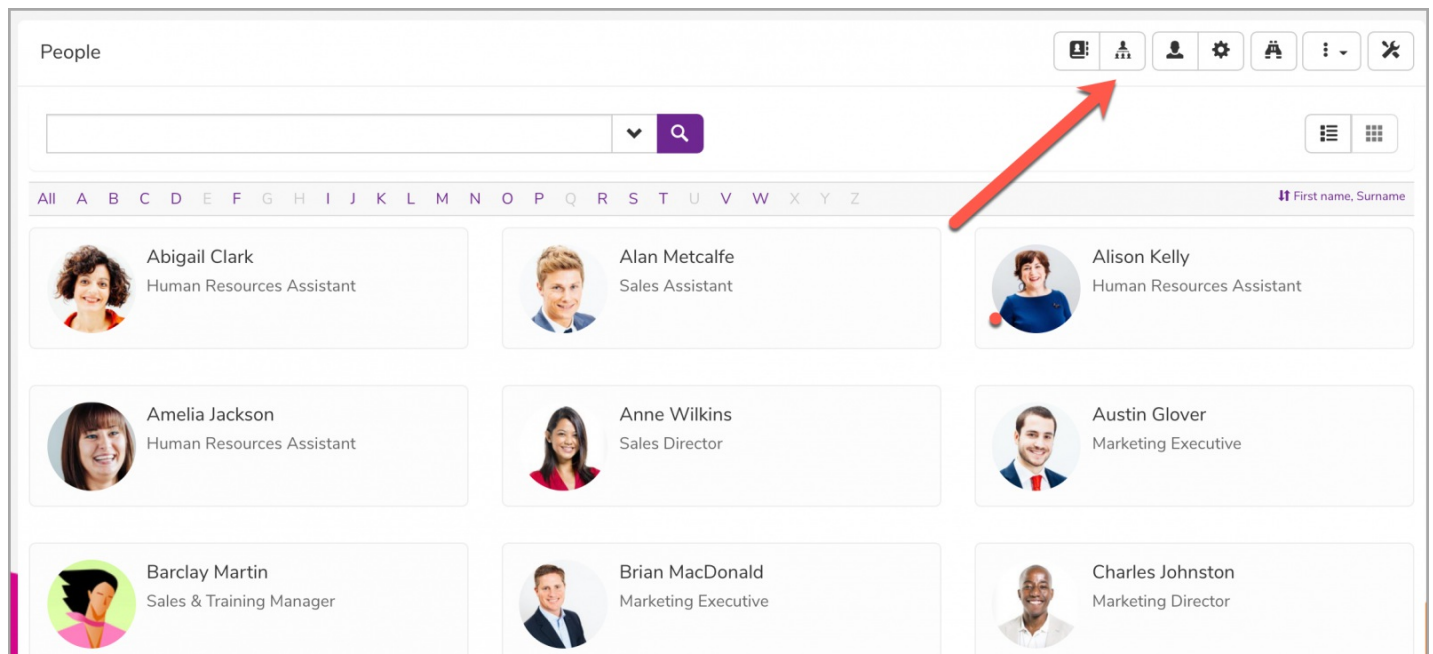
The information below is outlined in the video.

Org chart application

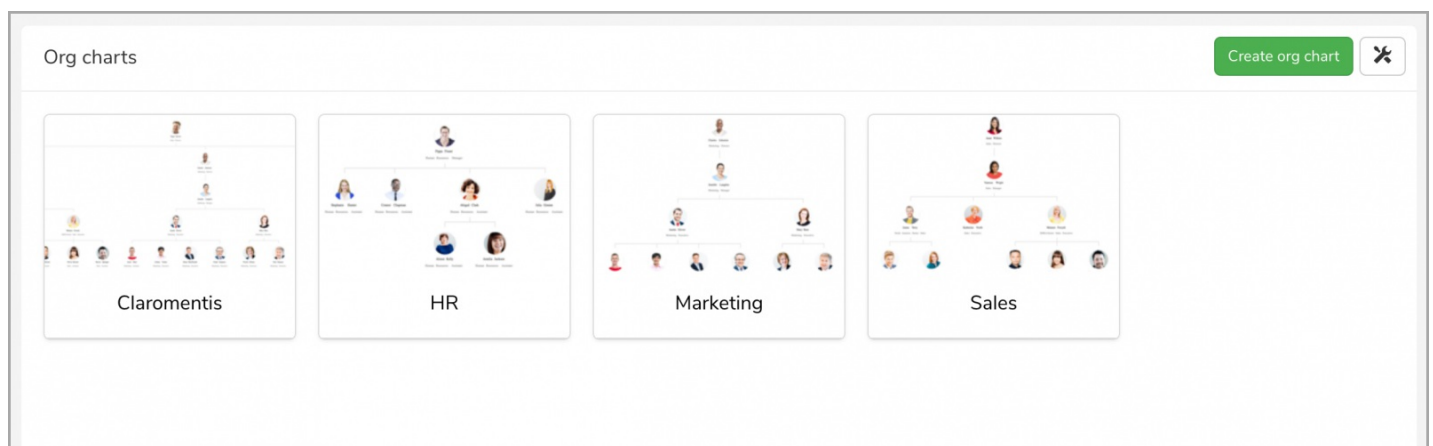
There are two ways you can get to the Organisation Chart application.

You can either access the org chart directly by going to Application > Org Chart.

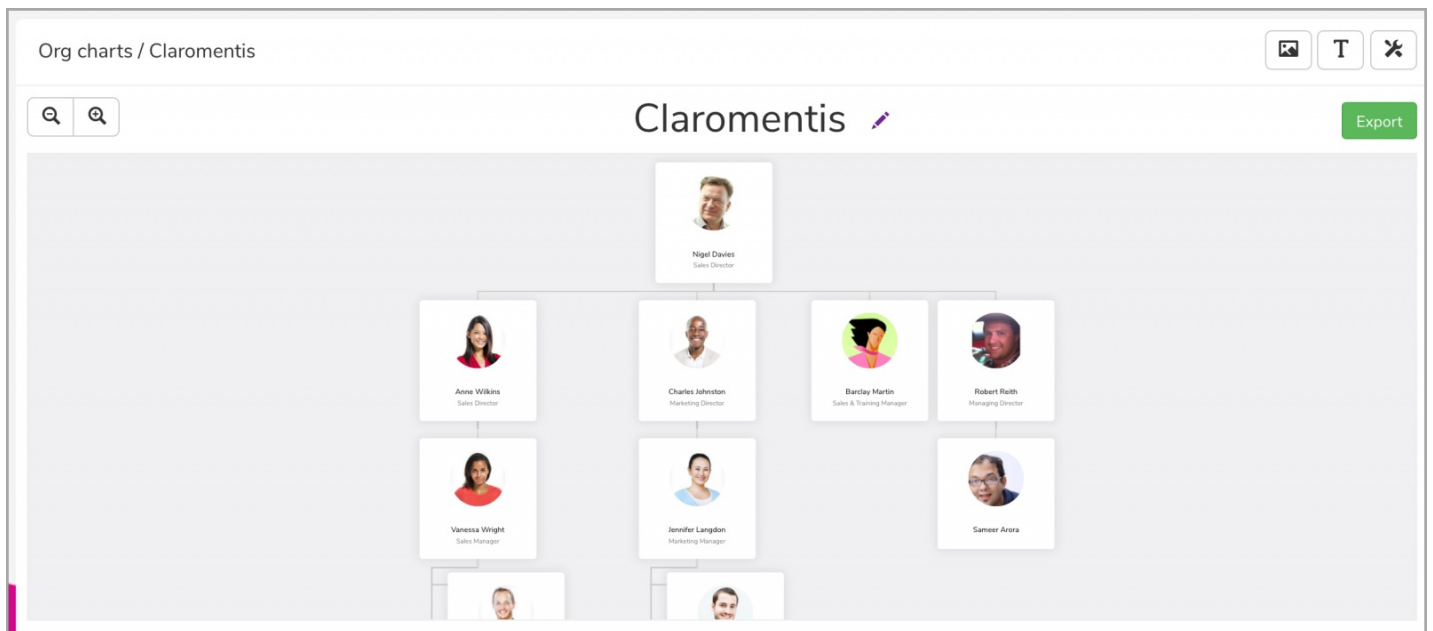
Or you can access the org chart from the People application by clicking on the 'Organisation Chart' icon:



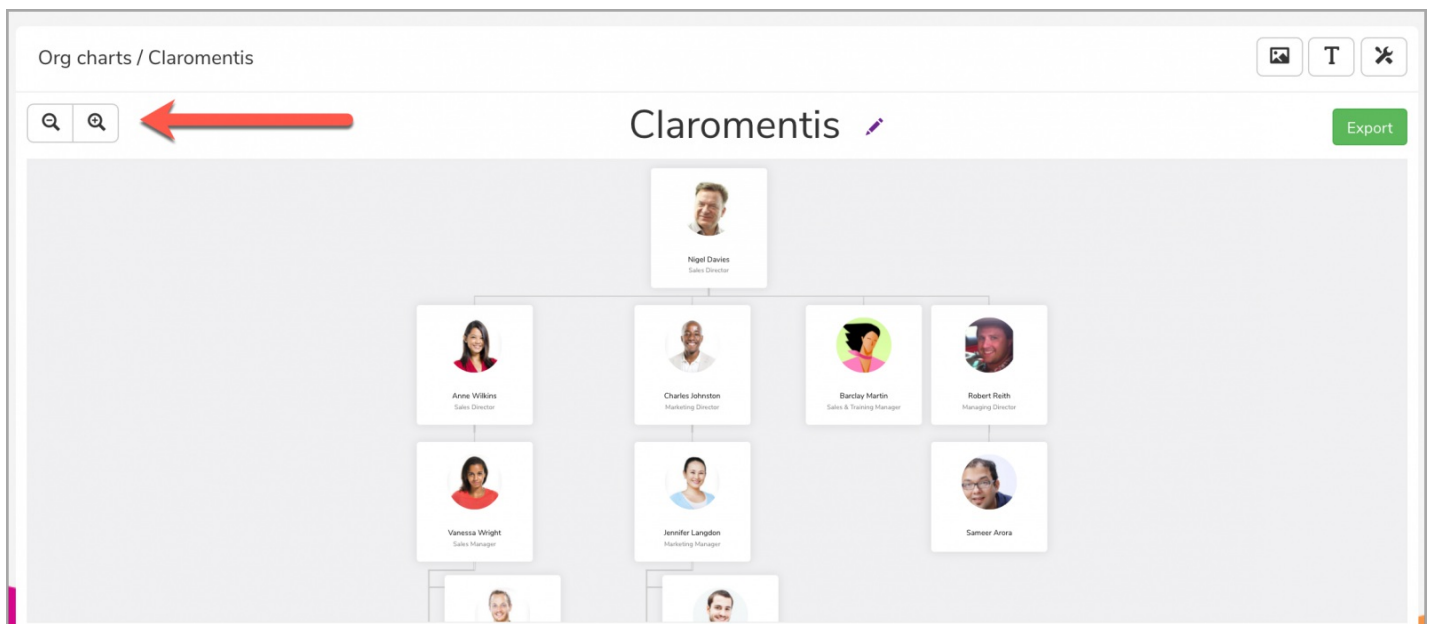
Depending on how these charts are configured, you will be able to view all existing org charts:



Selecting a chart will allow you to see it in its entirety:



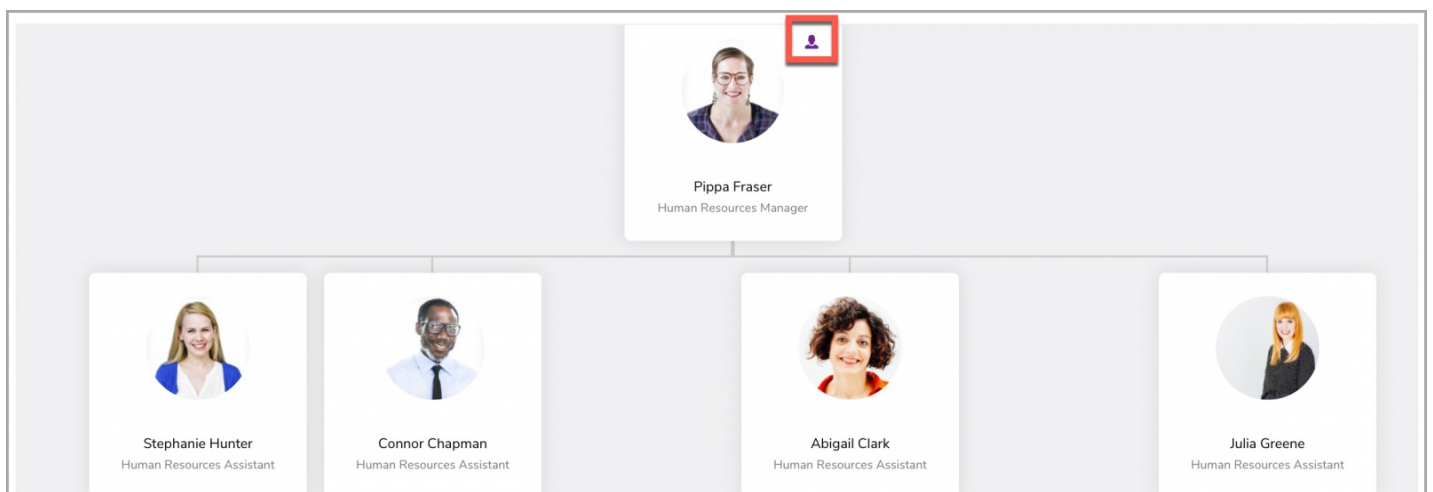
You can either Click & Drag to navigate around the org chart or you can use the zoom/minimise function.



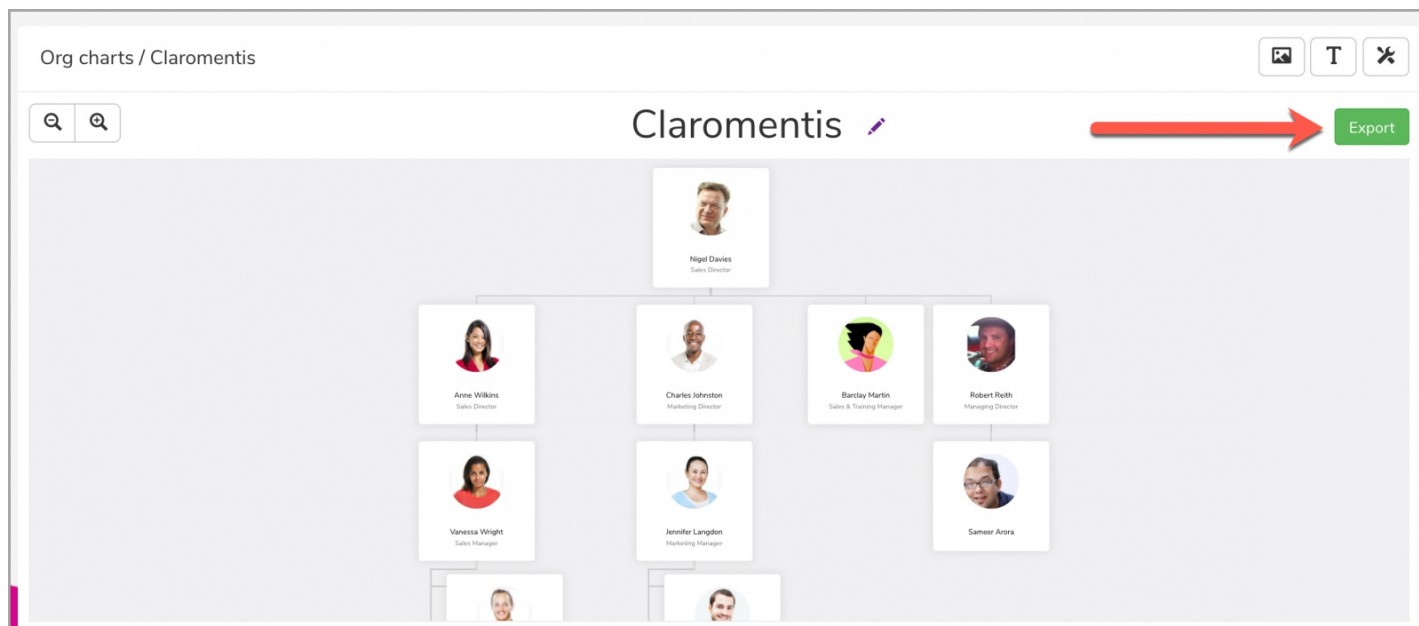
Please note: The zoom/minimise function is a press and hold button.

Org chart & people application

When in an org chart, clicking on the icon shown below will generate a chart focused on that user only, which will display their manager and any direct reports.



There is an option to export the org chart as a png if needed by simply using the 'Export' button:



How is the structure created?

An application administrator can access user profiles from Admin > People

Navigate to the 'Org Chart' tab.

The screenshot shows the 'Admin / People Control Panel / Edit user info' page. The 'Org chart' tab is selected. It features a 'Manager' field with a dropdown menu showing 'Pippa Fraser' and a 'Browse' button. Below it is a 'Direct Reports' field with a list of users: Allison Kelly and Amelia Jackson, and a 'Browse' button. There is also a link to 'View general org chart settings' and an 'Update' button.

The 'Manager' field denotes the user's manager.

The 'direct' reports field should reflect any subordinates.

Subsequently, when an Org Chart is created with one user at the top, the other levels populate based on the entries of these fields across your users.

These fields can be updated any time by an application administrator of People, or automatically if you are syncing this field from your Active Directory.